



## Message from the Chairman, *National CASU Board of Directors*

**T**he Cooperative Administrative Support Unit (CASU) Program enters the new millennium with continued growth in customer base, customer service, product lines and services provided, and, as a result, growth in network wide revenue. On this positive note, I am pleased to present the Fiscal Year 2000 Annual Report for the CASU Program. Although this report highlights accomplishments of the CASU

Network for the past year, it is important to value and recognize that these highlights are the results of daily endeavors by Network members. In addition, the local boards of directors and customer advisory groups and host agencies provide business leadership that enhances customer service and is instrumental to the growth of the CASU Network.

With this edition of the Annual Report, the CASU Program completes its fourteenth year of operation as an entrepreneurial government activity. The Program, established in 1985 by the President's Council on Management Improvement, promotes and provides an interagency reimbursable method for the effective delivery of Federal Agency support services. Revenues for FY2000 are \$226 million, a 7% increase over FY1999's \$211 million. These revenue figures coupled with positive responses from a customer survey (within this report) continue to show the CASU Network fulfilling customer needs.

Beginning with a successful pilot program in Seattle in 1986, the CASU Network has grown and evolved and is now represented in over 20 cities nationwide with local and national contracts. Some offices have established minor overseas work. Other notable CASU Network accomplishments include: consolidation of offices, closing of some offices, creation of franchise legislation, name changes for offices, responsiveness to outsourcing efficiencies, and an increase in reimbursable Government services. In spite of CASU's evolution, the central concept of the CASU Network remains "the effective delivery of Federal Agency support services." This is a benefit to taxpayers, due to cost-of-services savings, and a benefit to private industry since 95% of support services are outsourced. Clearly, as with any entrepreneurial endeavor, the CASU Network will adjust to customer needs.

I invite you to read and recognize the successes represented in this FY 2000 Annual Report. I look forward to additional successes as outreach and awareness of this Program are enhanced by all. On behalf of the National CASU Board of Directors, I congratulate the members of the CASU Network for their entrepreneurial spirit and continued growth of the Program.

A stylized, handwritten signature in black ink, reading "D. Cooke".

**David O. Cooke**

*Chairman, National CASU Board of Directors*

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## Message from the Executive Director

**I**t is inspiring to be part of a government organization instilled with entrepreneurial spirit. Clearly, promoting the longevity of the Program and exceeding \$200 million total revenue two-years in a row establishes challenging milestones to duplicate and surpass. Spreading awareness of the “best value” benefits that the CASU Network provides its customers is a paramount objective. To that end, our efforts will continue to concentrate on making others aware of the Program.

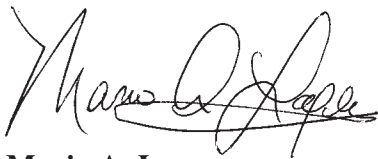
The ability for a Federal organization to maintain customer satisfaction, outsource and integrate private industry at a 95% level, as well as honor the guidance of local boards or customer advisory boards enhances the growth of the CASU Network. These traits were clearly demonstrated during my visits to Network member offices. I look forward to visiting all offices to learn more about how the National CASU Program Office can better market the Network, as well as each office. In addition, I continue to solicit your input on how the National CASU Program Office can enhance communications with each office and the local boards.

The jointly developed Strategic Plan, outlined in this Annual Report, continues to be the baseline for actions of the National CASU Program Office. Further, we have completed the Program Evaluation and Customer Survey - we thank all of you for your input. Special recognition to the team: Richard Pemberton (Dept. of Transportation) – Alternate Member CASU Board of Directors, Jeanne Kosch – team leader (Dept. of Transportation), Barbara Hazelett (Department of State), Wayne Richey (HHS/Program Support Center) – Alternate Member CASU Board of Directors, and Mariley Ferens and Yvette Waugh (National CASU Program Office). The website – [www.casu.gov](http://www.casu.gov) – has been redesigned to better distribute information and achieve visual appeal consistent with current websites. In addition, we have commenced development of a marketing plan to increase CASU Network awareness nationwide.

Consistent with previous years, CASU will continue presentations at conferences as an exhibitor and/or panelist and taking part on the planning committee for the Excellence in Government Conference. Outreach efforts will expand in numerous ways.

The CASU Network is dynamic. Changes have occurred and will continue to occur as the Network adjusts to administration factors, industry developments, and customer needs. I look forward to fostering the entrepreneurial spirit you’ve achieved and to being a collaborative partner in raising customer awareness of the “best value” benefits of the Program.

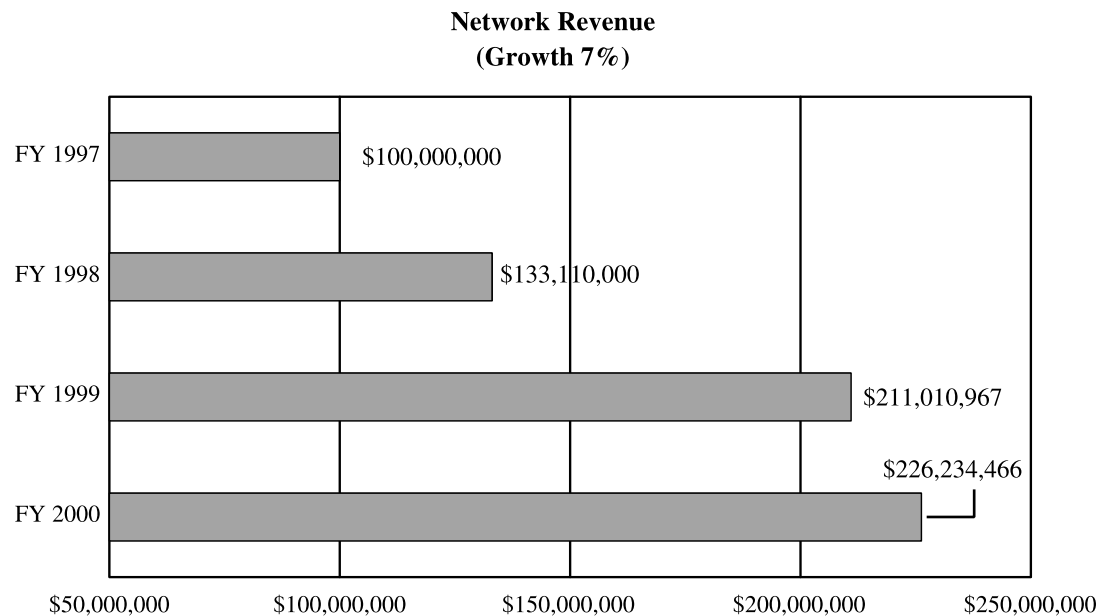
Very Respectfully,



**Mario A. Lopez**  
*Executive Director*

## CASU Network Revenue

The Network's revenues increased to \$226 million in FY 2000, a 7% increase from \$211 million in FY 1999. This increase signifies both growth in customer base and customer satisfaction and the value of the products and services that are offered by the CASU Network. The 10% growth in Network service options is evidenced by the steady rise in revenues.

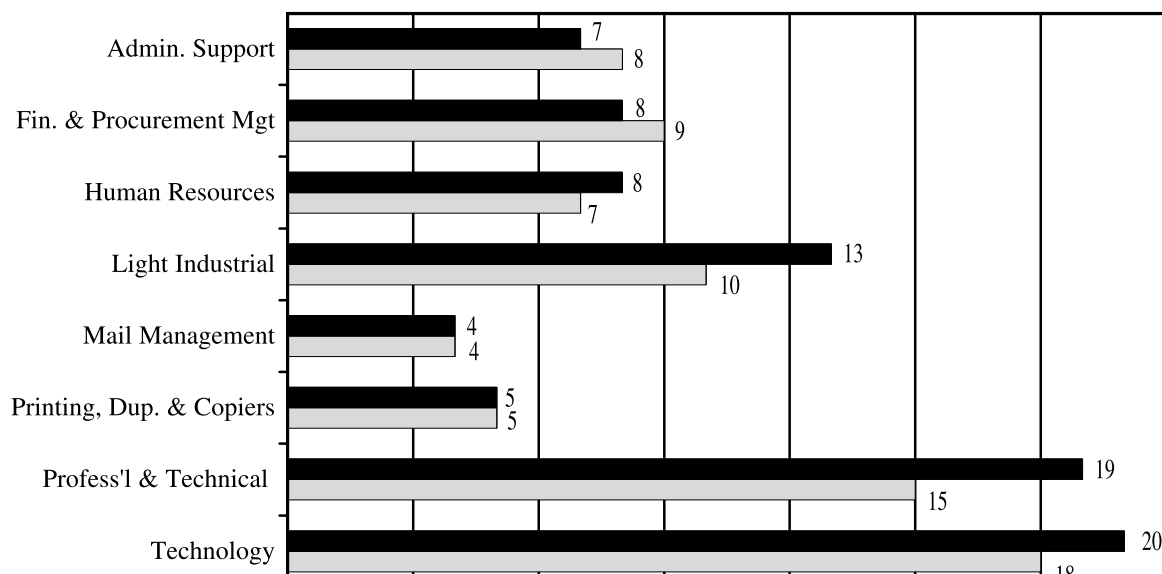


## CASU Network Services

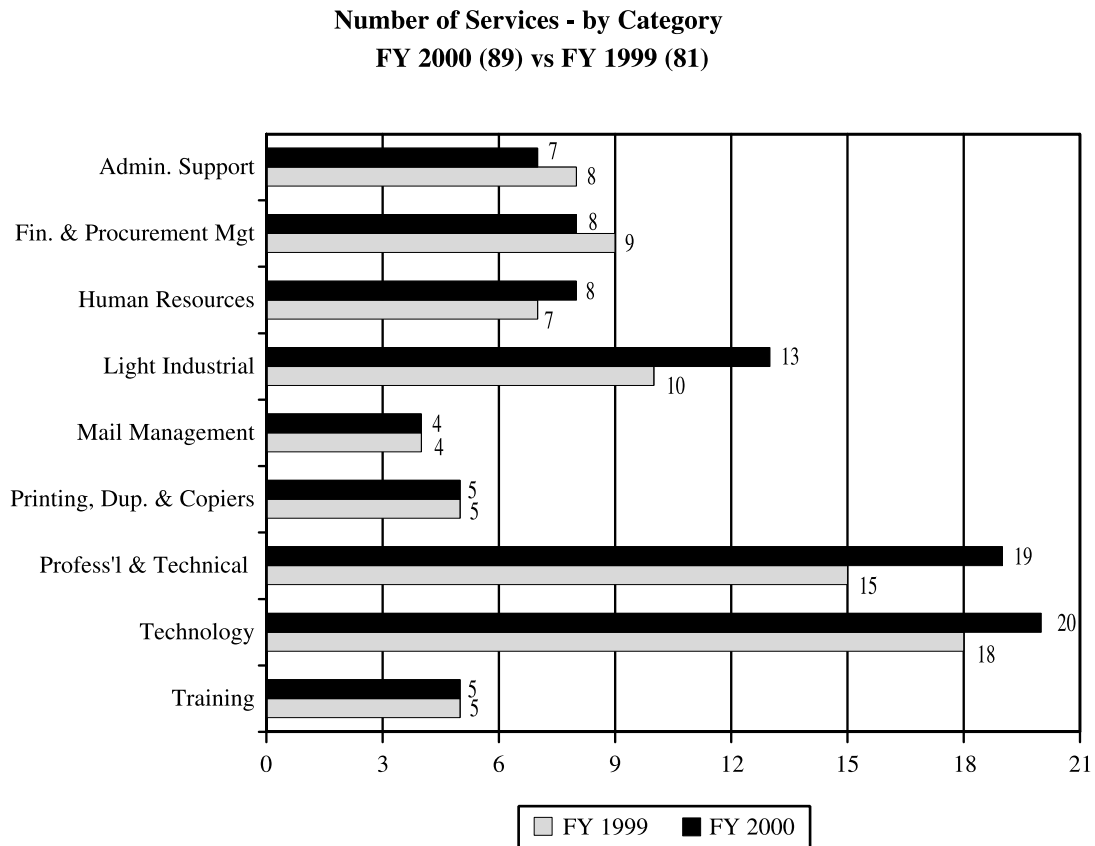
CASU is a customer-driven network that has the ability to tailor its program to meet customer needs through high quality, low cost services, with quick turn-around. Located throughout the United States, the Network provides support services that meet their customers' needs. In responding to customer demands, the Network increased the number of services that are offered by 10%, from 81 to 89 services for FY 2000. This shows the trend over a period of years and how customer demand will affect the number of services offered by the Network. Customers requested new services for human resources, light industrial, professional & technical, and technology services. For a second consecutive year, the Technology and Professional & Technical service categories continued to grow and lead the Network's service requests. In the FY 2000 Customer Satisfaction Survey, 90% of the customers rated the quality of CASU products and services as excellent or good. Moreover, noting the Program's convenience for multiple services and cost savings as reasons for using the program, customers expressed the desire to continue receiving services from the Network.

The CASU Network does not rely on Federal staff to fulfill service requests. More than 95% of the Network's products and services are provided through commercial contracts. Using commercial sources permits the Network to offer the latest technology and highly experienced workers. Contracts are compliant with the Federal Acquisition Regulations.

**Number of Services - by Category**  
**FY 2000 (89) vs FY 1999 (81)**



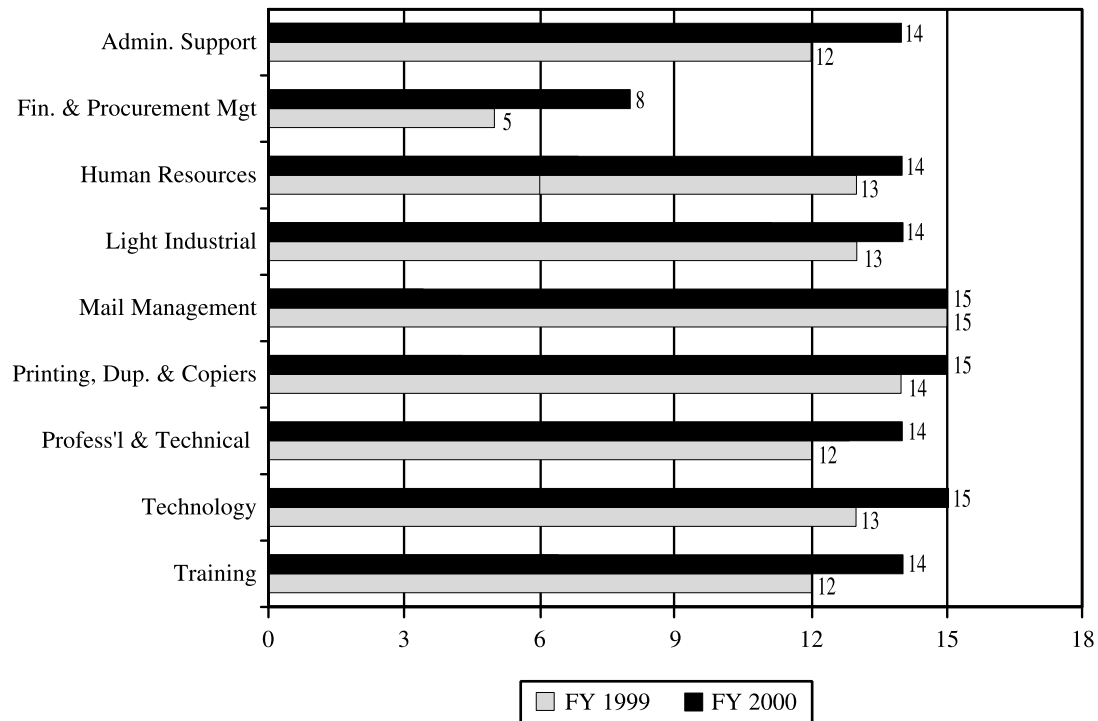
*This graphic depicts the number of Network support services, by category. There is a notable increase for the Light Industrial, Professional & Technical and Technology categories.*



*This graphic also illustrates how the 89 support services are distributed amongst the service categories. Further, it shows the differences between FY 1999 and FY 2000 and where the increase [8 new services] occurs.*

*This graphic shows how many of the 17 CASU Network members provide services for a particular category. While the Network members' programs are becoming more diverse, the greatest increase occurred in the Financial and Procurement services category.*

**Number of Network Service Providers - by Category**  
(out of 17 network members)

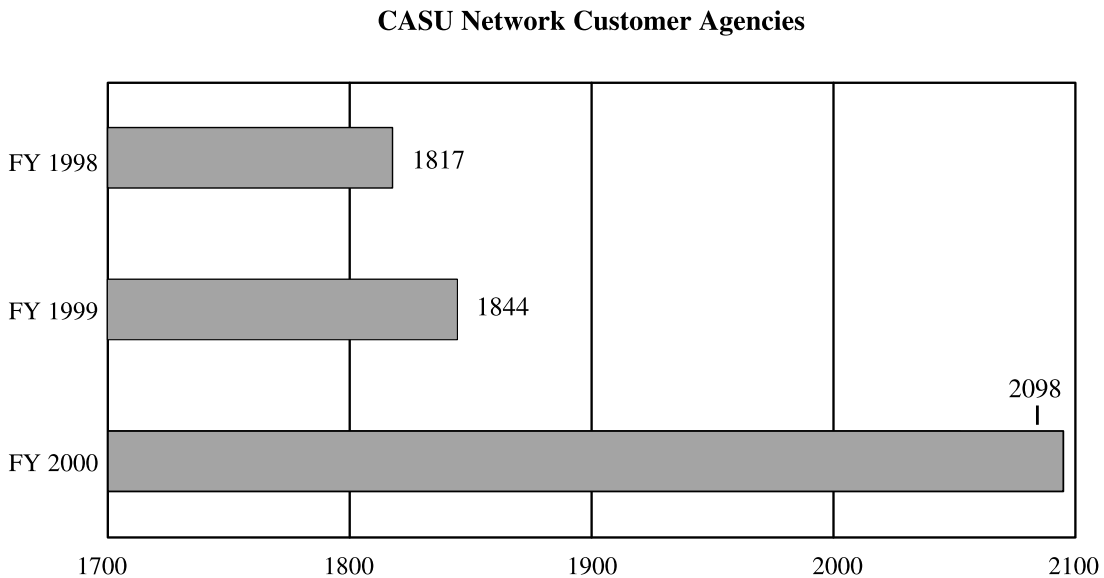


## CASU Customer Agencies

The CASU Network continues to reach across the Federal market, making its presence known in Federal departments, small agencies and military services throughout the United States and overseas. The Network increased its customer agency base by 14%, to 2098 for FY 2000. The steady growth in customer base and the 91% customer satisfaction rating for overall program quality together illustrate that CASU is providing a service that is desired by its customers. The network measures the number of customers by the number of signed agreements for reimbursable service. Thus, one signed agreement can represent multiple agencies or field offices for each customer. As a result, the actual customer base far surpasses 2098.

The pull-out section of this Report contains a “CASU Network Customer Agencies” listing which is a composite, by Federal department or small agency, of customers for each CASU Network member. To find out if a service is provided to a particular sub-element or field office, please contact the individual CASU office that supports the parent organization.

*This graphic depicts the increase in the number of customer agencies from FY 1998 through FY 2000.*





## Customer Comments

The success of the CASU Network is not only measured by its impressive numbers, but also by the observations of experts, its customers:

### ***Staff Performance***

1. Outstanding in every way.
2. Very professional and extremely customer friendly.
3. In all dealings I have had with the CASU staff, they have always been extremely professional, friendly, and reliable. I enjoy working with them.
4. Staff is always professional and provides quick response.
5. CASU staff has solved every challenge posed.
6. Again, great services... very customer oriented.

### ***Timeliness [Delivery]***

1. Easily met our expectations.
2. Always timely and kept informed.
3. Sure faster than hiring temporary civil service employees.

### ***Tailoring Services and Products***

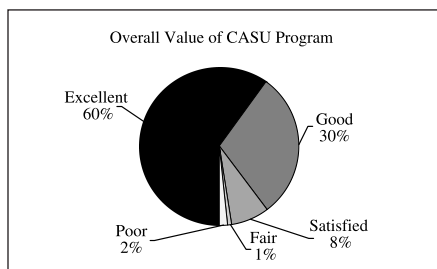
1. Extremely helpful - anticipated our needs.
2. CASU has always accommodated our needs
3. Money-wise and time-use - excellent!

### ***Reasons for Using CASU and Value of CASU Program***

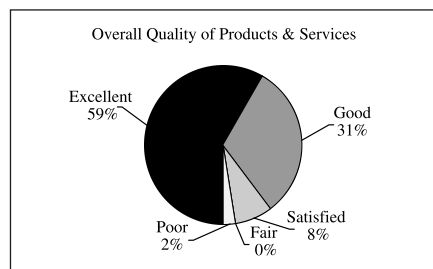
1. I have worked with CASU in other areas and think that it is an outstanding program.
2. CASU had the skills we needed at a competitive cost.
3. Great to have CASU on-site: seems like it is impossible to get things done if you have to go outside of government.
4. We really enjoy working with CASU staff, because they are helpful, friendly and work diligently to accommodate our needs.
5. Excellent tool when civilian billets are downsized.
6. Flexible and efficient compared to civil service recruitment
7. CASU provides great FLEXIBILITY to our office.

## CASU Customer Satisfaction Survey

CASU's 1999-2003 Strategic Plan required an assessment of the Network's performance in meeting customer needs and directed the National Staff to *"initiate a system of Network-wide surveys to assure feedback and provide marketing information on performance, service needs and trends"*. The survey focused on the quality of products and services, staff performance, timeliness of product delivery, program flexibility and the overall value of the Network. As indicated below, CASU's first attempt to establish a baseline for customer satisfaction consistently received high ratings of excellent or good for all categories. *Note: Percentage ratings shown represent analysis of customer surveys received.*

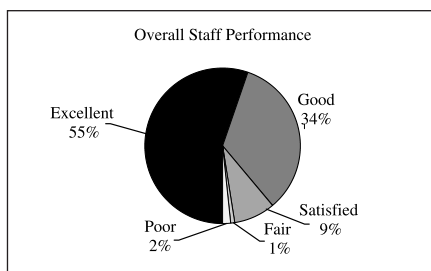


90% rate as excellent or good

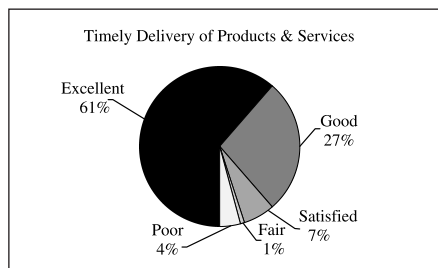


90% rate as excellent or good.

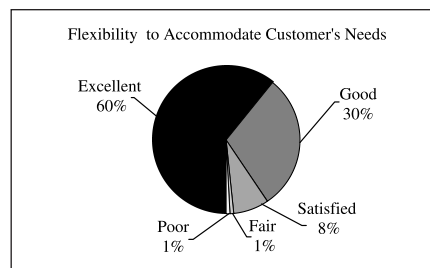
The success of the CASU Network is not only measured by its impressive numbers, but also by the observations of experts, its customers. Customers noted that the CASU Program is valuable and beneficial to their respective operations; CASU continues to provide quality and timely products and services that meet their needs; and CASU has skilled and responsible staff that tailor products and services to accommodate their needs. Additionally, most customers noted the major reason for using the CASU Program, as either (1) CASU is a convenient source for multiple services or (2) CASU offers cost savings in time and effort. Customers were extremely pleased with the level of service provided; the Network received numerous accolades for services rendered. Several customers inquired about new types of services. In response to the question on recommended improvements, a few customers requested CASU to improve the timeliness and accuracy of billing statements.



89% rate as excellent or good



88% rate as excellent or good



91% rate as excellent or good

## The Year in Review

The CASU Network opened the fiscal year with a revenue benchmark surpassing \$200 million in FY 1999. The total revenue of \$211 million clearly revealed growth. Would FY 2000 show equal revenue or set a new benchmark? Consistent with previous years, the membership expected leadership from the National CASU Program Office for effective customer outreach and name awareness.

Changes in the CASU Network initiated in 1999 came to completion in FY 2000. Both the South Carolina CASU and the Northern Colorado CASU in Fort Collins changed lead agency to the Department of Interior. The Southeast Regional CASU changed lead agency to Department of Veteran's Affairs. The Pittsburgh CASU merged with the Northeast Regional CASU (lead agency the Department of Labor).

Other changes include: Franchise Business Activity name changes 1) FBA San Antonio CASU to FBA Global Services, 2) FBA St. Louis, FBA Seattle, and FBA MIDWEST forming FEDSOURCE – with Department of Treasury as lead agency.

At the January National Board of Director's meeting, groundwork commenced on the Program Review of the National Staff and Role of the National Board with the review team further defined. Discussions relative to entrepreneurial government (EG) and the nature of franchising discussed. In addition, customer survey status was reported with anticipated completion. An EG pre-conference workshop was proposed to GovExec for their annual conference.

In March, the FY 1999 Annual Report was published and distributed. Total revenues were \$211,010,967 and were a 59% increase over the previous year.

In May, the Mid-Year Director's conference was held in Oklahoma City and hosted by the Federal Executive Board. A variety of entrepreneurial government, management, and marketing sessions were held with a brainstorming session at the Team Technology Center.

In June, Mike Sneed, Executive Director National CASU Office retired from the Federal Government and Mario Lopez was named Interim Executive Director and approved by the National Board meeting in July as Executive Director. Also, at the July meeting continued status of the Program Review reported with milestones outlined.

July also provided CASU Network participation in the Annual Excellence in Government Conference via an Exhibitor Booth, a pre-conference workshop, and session participation by CASU Network representatives.

In September, CASU was represented at the Annual National Guard Bureau (NGB) Conference in Atlantic City.

The Annual Conference in November held in Washington, D.C. re-affirmed the desire of members to continue as a network. Further, the importance of local boards of directors and customer advisory councils were clearly emphasized due to the leadership these groups provide. The National Board of Directors meeting was held and the final Program Review was presented for comments. Also, the first presentation of the new National CASU Website was presented.

The composition of the National Board of Directors changed during FY 2000. Representatives of the Department of Labor and Department of Agriculture retired. Department of Health and Human Services hired a new director for the Program Support Center. Some new alternate members were named.

The National CASU Program Office will continue to work with the Entrepreneurial Government Committee of the CFO Council and planning for the Annual "Excellence in Government" conference. Outreach to National Board of Directors, local boards of directors and other councils will be enhanced and attendance at various conferences is being planned. A new website will be launched to enhance business information sharing with all network members.

## ***CASU Network Accomplishments***

### **FY 2000 SUCCESS STORIES**

**F**or the following, CASU Network members were asked to share local accomplishments and success stories from FY 2000. The summaries are arranged alphabetically by state. Most CASUs publish their own annual reports. The National CASU Board of Directors encourages direct contact with CASU Network offices for copies of their annual reports and for additional information about their local programs and business lines. Links are available to CASU Network member websites from the National CASU website at [www.casu.gov](http://www.casu.gov).

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#### **Colorado**

##### **ROCKY MOUNTAIN REGIONAL CASU (RMRC)**

###### ***Service area - Mix of regional and national services***

The RMRC in Denver increased its revenues by 24%, to over \$11 million during FY 2000. With outstanding leadership from its lead agency, Minerals Management Service, U.S. Department of the Interior, and with the support of the local CASU Board of Directors, changes are being made in the RMRC's internal structure to reduce operating costs and to streamline operations. Transition to a new service provider for accounting services is underway and will provide significant savings in overhead costs, resulting in reduced fees to clients. Additionally, the RMRC is making strides to further automate various aspects of its operation which will allow customers to electronically submit service requests while capturing ordering data for financial tracking purposes.

RMRC Director Bill Case and his staff participated in several national and local conferences, marketing their services to a wide variety of government agencies and activities. Numerous staff members of the RMRC have been recognized by customers for outstanding service. Various schools have formally expressed their appreciation for the property received through RMRC's school donation program.

FY 2001 goals and objectives are to build on the successes of the FY 2000 operational changes and marketing efforts. The RMRC will continue to market and expand its client base. The ultimate goal is to continue increasing revenues and decreasing the fees charged to CASU clients.

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#### **Florida**

##### **SOUTHEAST REGIONAL (SER) CASU**

###### ***Service area - National and international***

The SER CASU, located in Lynn Haven, Florida, has now completed its fifth year of operations. They experienced another highly successful year, with revenues over \$46 million. The number of customers increased to 175 in FY 2000, from 143 in FY 1999. This was the first year with the new lead agency, Central Texas Health Care System of the Department of Veterans Affairs. During FY 2000, as SER CASU Director Ed Donnelly states, "SER CASU continued to provide unexcelled responsiveness, quality products, and substantial savings to our customers."

Objectives of SER CASU for FY 2001 include: 1) continue to be unmatched in responsiveness to CASU members/customers; 2) increase CASU membership and gross revenues, to achieve further benefits of economy of scale and thereby maintain the lowest possible administrative fee structure; and 3) launch and maintain Outsourcing.gov as a full service e-commerce initiative of the SER CASU.

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## **Louisiana**

### **NEW ORLEANS CASU**

#### ***Service area - Louisiana***

Ron Appel has been the New Orleans CASU Director for the past 10 years. Child care services, provided by the U.S. Postal Service, are available to all local Federal agencies. The child care program provides a 37% saving over normal alternatives. The photocopy management program is continuing to grow. Photocopy management customers report savings from 20% to 35% annually. A consortium with the University of New Orleans Computer Training Center, has provided computer training courses for Federal employees at a bulk discount of 22% over single course prices.

The mediator pool program is a new program designed to help Federal agencies resolve employee disputes in a timely, informal, and cooperative atmosphere. The CASU Director manages a pool of interagency mediators to meet that need. The cost of settling disputes varies. However, with the cost of contract mediation approaching \$1200 per day in the local market, it is estimated that the New Orleans CASU has saved tens of thousands of dollars in this particular program.

The New Orleans CASU program has continued to grow, with FY 2000 revenues projected to be over \$450,000. During the past year, the New Orleans CASU Director received the National CASU Director's Award.

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## **Minnesota**

### **MINNESOTA CASU**

#### ***Service area - Minnesota***

The Minnesota CASU in the Minneapolis/St. Paul area is in its second full year of operation. In April 2000, the local CASU Board of Directors chose the VA Debt Management Center as a franchise fund to run and manage the CASU. The Minnesota CASU is seeking ways to expand operations while maintaining a tight control on expenses. There is a strong customer base in the state and there is potential for growth. Marketing efforts have been expanded throughout the year to get information regarding CASU's product lines out to as many agencies as possible. The local CASU board of directors and the Department of Veterans Affairs, in their role as lead agency, have supported the marketing efforts. The Minnesota CASU's foremost goal in FY 2001 is to expand their customer base. They will focus on marketing copier management services, their most successful program.

## **Missouri**

### **MID AMERICA CASU**

#### ***Service area - Mix of regional and national services***

The Mid America CASU in Kansas City, Missouri, saw an 11% growth in their customer base during FY 2000, for a total of 90 customer agencies. A new shredding service was added, bringing the number of services to 17. Revenues increased to \$4.6 million in FY 2000, a 9.4% increase over FY 1999. A major project for the year involved installing and training the staff on a new financial tracking system. The new system provides for daily entry on activities requested by customers, monthly billing statements, and other features which allow the Mid America CASU to serve their customers more efficiently.

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## **New York**

### **NORTHEAST REGIONAL CASU**

#### ***Service area - Mix of regional and national services, including Puerto Rico and the Virgin Islands***

The Northeast Regional CASU, with offices in New York and Pittsburgh, added several new services and vendors in FY 2000. During the year, they took over the management of three employee fitness centers in New York City, awarded new employee assistance program (EAP) contracts in Pittsburgh and New York City, expanded the scope of their temporary help service, and added new vendors to their photocopier service.

Representatives of the NE Regional CASU attended several trade fairs and conferences, including the annual "Excellence in Government" conference in Washington, DC. The CASU also reviewed and revised some of its internal administrative procedures in order to become more responsive to its customers' needs. The number of customer agencies increased by 23% in FY 2000 and revenues increased to \$9.1 million.

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## **Oklahoma**

### **OKLAHOMA CASU**

#### ***Service area - Mix of regional and national services***

The duplicating facility has been the flagship of the Oklahoma CASU. They are gradually expanding their customer base by providing low cost, high quality, fast turnaround projects such as the printing of Emergency Response Plan "templates" for the Oklahoma Federal Executive Board (FEB). This service has also been extended to other FEBs who may be interested. Jim McCarron, Printing and Distribution Team lead is a recipient of a National CASU Award for fiscal year 2000. The award justification stated that Jim McCarron's "...accomplishments are noteworthy and a testament to the benefits of entrepreneurial government."

Oklahoma CASU's revenue for FY 2000 was \$15.3 million, an increase of more than 17% over FY 1999. Program goals for 2001 include: 1) grow the local customer base; 2) develop partnerships with other CASUs; 3) add a new service activity to the Oklahoma CASU; and 4) increase CASU name recognition locally and nationally.

## **South Carolina**

### **SOUTH CAROLINA CASU (SCC)**

#### ***Service area - Mix of regional and national services***

The SCC in Beaufort completed a productive and successful year as an affiliate of the Rocky Mountain Regional CASU under the Minerals Management Service, U.S. Department of the Interior. SCC increased its customer base by 50% while continuing to provide outstanding service. SCC Director Jackie Coleman had an active year serving as the CASU Director representative on the National CASU Board, as a panel member at the Excellence in Government Conference, and as a participant at the American Society for Public Administration Conference.

The SCC conducted an active marketing program that included attendance at national conferences and individual sessions with high-level government representatives throughout the eastern United States. The FY 2001 goals and objectives are to build on the successes of the FY 2000 marketing efforts. The SCC will continue to expand their client base to increase revenues and decrease the fees charged to CASU clients.

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## **Texas**

### **FORT WORTH CASU**

#### ***Service area - Dallas/Ft. Worth area***

During FY 2000, the Fort Worth CASU invited new members to join the local CASU Board of Directors. CASU Director Paul Marsicano attended Federal Executive Board meetings to promote the CASU program. A new CASU brochure was designed and published that markets Fort Worth CASU services. The Fort Worth CASU was able to reduce by 5% the overhead rate charged to participating agencies. This fee reduction was accomplished by cutting operational costs. They also developed an improved system for monitoring CASU accounts receivables.

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## **Virginia**

### **GREATER HAMPTON ROADS (GHR) CASU**

#### ***Service area - National and international***

Revenues reached a new high of \$18 million in the face of significant government budget reductions. Through austere fiscal management, the GHR CASU returned over 25% of the collected fees to their customers. They have also implemented a 40% reduction in fees beginning in fiscal year 2001. CASU Director Holly Mason states, "these kinds of initiatives build good will with customers, helping create a healthy relationship for the future." Savings to customer agencies are estimated to be approximately \$7.7 million.

The GHR CASU orchestrated the award of a \$170 million support services contract. The contract greatly simplifies the ordering process as well as reduces costs. It covers a broad range of ninety-two work categories. The new support contract is nationwide in scope and could serve well in supporting government privatization and A-76 initiatives.



The GHR CASU currently supports 75 customer activities, which represents an increase of 120% over FY 1999. GHR CASU began developing an ambitious Business Operating Plan composed of goals and objectives, business plan, and marketing plan. The highlights include support of National CASU Board initiatives, expanding operations through aggressive marketing initiatives, developing a system of performance metrics, and customer surveys.

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### **Treasury Franchise Business Activities (FBAs)**

**FBA-WEST (California); FBA-CENTRAL (Ohio); FBA-EAST (Maryland);  
FBA-GLOBAL SERVICES (Texas); FEDSOURCE (Illinois, Missouri, Washington)**

#### ***Service area - Mix of regional, national and international services***

The Treasury FBAs provide entrepreneurial business solutions for the acquisition, delivery and financial management of common administrative services and products in support of agencies' missions and objectives. Each of the product groupings is designed to meet the stated needs of the customer. The essential elements of quality packaging and delivery combined with volume consolidation are built into each FBA's contracts and agreements. The services are provided to more than 150 federal departments and offices throughout the nation, all of which are provided by private sector contracts and by other government agencies, the latter method used only where specific criteria establish unique circumstances or a government agency is the only source of the required service.

The FBAs' FY 2000 highlights and accomplishments: 1) FBAs have increased their customer base reflecting customer's satisfaction and perceived value of products and services; 2) FBAs provide a streamlined system with a focus on full cost accountability, simplified rules of use, single step processes and delivery based on competition and timeliness; and 3) Benchmarking of several product lines is underway to demonstrate competitiveness, efficiencies and savings related to FBA services/products.



## Annual CASU Awards Ceremony

Proclaiming that, *"their outstanding accomplishments are a testament to the benefits of entrepreneurial government"*, Mr. David O. Cooke, Chairman, National CASU Board of Directors, presented network members with awards for: CASU Director, CASU Outstanding Service, and CASU Team. In appreciation of their respective contributions to the National CASU Program, each group and individual recipient received a sculptured-glass plaque. A framed Certificate of Appreciation was given to each team and individual member. The FY 2000 Awards Ceremony was held on November 30, 2000 at the Omni Shoreham Hotel in Washington, DC. The award recipients were:

### CASU Director Award 2000

**Mr. RONALD J. APPEL**, Director, New Orleans CASU

In recognition of dedicated administration and innovative management as the CASU Director for the New Orleans Federal community.



**Recipient:** Ron Appel, Director, New Orleans CASU

**Left:** Mario Lopez, Executive Director, National CASU Program **Right:** David O. "Doc" Cooke, Chairman, National CASU Board of Directors

**Ms. HOLLY MASON**, Director, Greater Hampton Roads CASU

For extraordinary public service, astute vision, management skills and leadership that has promoted the mission and goals of the CASU program. Through the use of innovative program management techniques and Acquisition Reform principles, she has substantially improved the efficiency and effectiveness of services provided. Her visionary ideas, coupled with considerable experience, allow her to serve as a model for others and her personal effort has provided the solid foundation for continuous improvement.



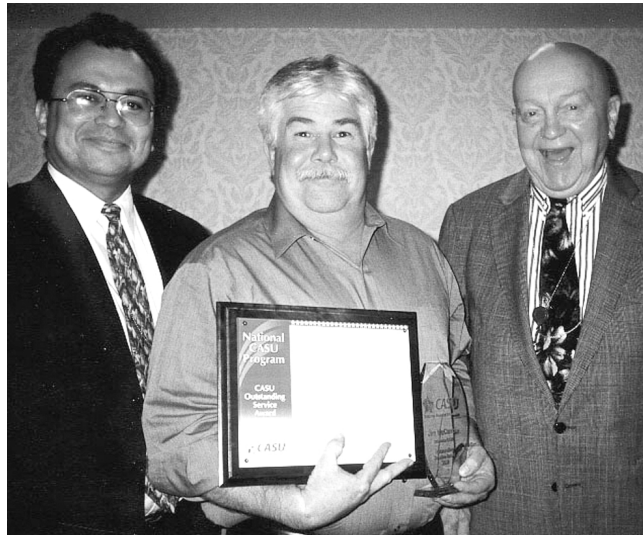
**Recipient:** Holly Mason, Director, Greater Hampton Roads CASU

**Left:** Mario Lopez, Executive Director, National CASU Program **Right:** David O. "Doc" Cooke, Chairman, National CASU Board of Directors

## CASU Outstanding Service Award 2000

**Mr. Jim McCarron**, Supervisory Printing Media and Distribution Specialist, Oklahoma CASU

For your dedicated and enthusiastic support of the Oklahoma CASU. Your hard work, cooperation and friendly customer service have made the franchise ideals a reality. Thanks for your tireless encouragement and willingness to tackle the tough issues.



**Recipient:** *Jim McCarron*

**Left:** *Mario Lopez, Executive Director, National CASU Program*    **Right:** *David O. "Doc" Cooke, Chairman, National CASU Board of Directors*

## CASU Team Award 2000

**Southeast Regional CASU-TEAM:** Mary Dayton, Ken Hammons, Ken Gaby, Gene Cox, Suzette Allick, and Ed Donnelly

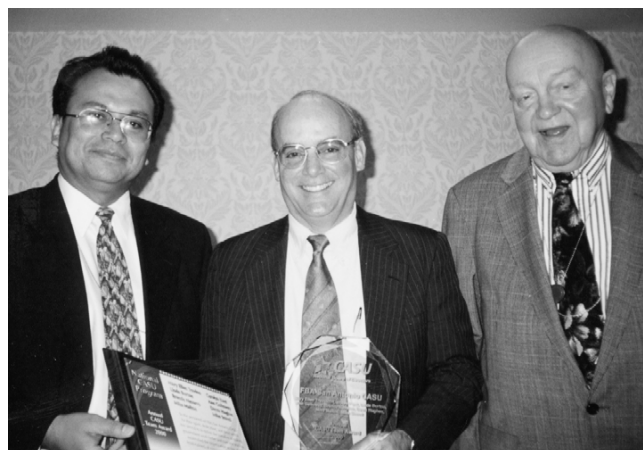
For exemplary vision, initiative and entrepreneurship in development and application of the CASU concept in the Southeast Region, pioneering intergovernmental partnering and providing extraordinary responsiveness to customer needs in a broad range of quality services, and producing estimated savings of over \$31 million to SER CASU member agencies in fiscal years 1996 through 2000.



**Recipient:** Southeast Regional CASU    **Pictured:** Suzette Allick  
**Left:** Mario Lopez, Executive Director, National CASU Program    **Right:** David O. "Doc" Cooke, Chairman, National CASU Board of Directors

**FBA-San Antonio CASU-TEAM:** Mary Ellen Trevino, Carolyn Kent, Linda Burton, Ann Galloway, Brenda Navarro, Dawn Hughes, Mike Maltos, Mike Sneed

To the personnel of FBA-San Antonio CASU for their spirit, dedication, and drive which has served to re-define the initiative of making government work better and cost less and has established the organization as one of the front-runners of entrepreneurial government.



**Recipient:** FBA San Antonio    **Pictured:** Mike Sneed  
**Left:** Mario Lopez, Executive Director, National CASU Program    **Right:** David O. "Doc" Cooke, Chairman, National CASU Board of Directors

## National CASU Program Office

### *Accomplishments/Activities*

**T**he **National CASU Program Office** endeavors to promote the benefits of the CASU Network by actively interacting with Public and Private Sector personnel to increase awareness of this entrepreneurial government activity. Further, information which affects the CASU Network is pursued, tracked, researched, analyzed, distributed, etc. by the National Office to enhance business decision-making by Network members. The following outlines some of the activities that the National CASU Program Office accomplished during calendar year 2000 to further awareness of the program for the benefit of customer(s), prospective customer(s), and Network Members.

#### **Conference/Meeting Actions - Planning, coordination, and/or participation of:**

- National CASU Board Meetings (4 per year)
- CASU Network Mid-Year Director's Conference
- CASU Annual Conference
- CASU Network local board meetings
- Excellence in Government Conference
- Pre-Conference Workshop at Excellence in Government
- Entrepreneurial Government Committee
- American Society for Public Administration (ASPA)
- Federal Executive Board Annual Conference
- Section 508 - Federal IT Accessibility Initiative
- Miscellaneous presentation to existing/prospective customer agencies

#### **Business Analysis, Research, and Customer Awareness/Network Member Actions:**

- Website (Re-creation, data collection/analysis/compilation, and conceptual development)
- Brochure update (data update and conceptual development)
- Customer Briefing Package(s)
- Annual Report (data collection, data analysis/compilation, and conceptual development)
- Program Review (strategic assessment, data collection/analysis/compilation, and conceptual development)
- Customer Survey (survey, data collection/analysis/compilation, survey assessment)
- Legal Review and coordination of issues
- Customer referral(s) and endorsement of Network Members
- Information collection/distribution for Customer/Network Member
- Coalition/Partner building with various agencies

#### **Researching, Tracking, and Distributing Strategic information:**

- Administration Policy and Regulation updates
  - Presidential actions/proposals
  - Senate actions/proposals
  - House actions/proposals
  - OMB Budget actions/proposals
- Agency actions/proposals (includes Website information)
- Business Trends and Agency strategic plan changes
- Acquisition Reform(s)
- FAIR Act
- A-176 issues
- Government Management Reform Act (GMRA)
- Research Publication information e.g.:
  - Federal Times, Government Executive, E-Gov, Agency newsletters and Websites
- Miscellaneous Conferences and Training Activities

#### **Mediation and Problem Resolution**

## CASU History

Since our creation in 1985, CASU has had a clear mission to provide a full range of common administrative support services. Developed during a period when government employees themselves provided the vast majority of this support, CASUs were centralized organizations designed to meet limited administrative service needs in a single, multi-tenant building. Savings were first achieved by consolidating mailrooms, combining labor and moving staffs, and centralizing high-volume photocopying into a single copy center. Eventually, CASUs offered cost-per-copy photocopier contracts in addition to copy centers, and mailroom staffs that processed mail according to each customer's unique specifications.

An increase in demand for different services led CASUs to expand their scope of operations. CASUs grew from serving single buildings to groups of buildings in a downtown location, then entire metropolitan areas, whole states, and even entire regions of the country. Meanwhile, economies of scale were achieved by bundling customer requirements and shifting emphasis from providing services with in-house staff to a mixture of contracts and dedicated FTE. Federal downsizing accelerated this trend along with a corresponding decrease in the number of CASU employees. CASUs adjusted to market conditions and Federal Government factors. Essentially, CASUs responded to trends.

As part of a trend, CASU services were provided through the use of contract services. This allowed CASUs to extend their business reach beyond their initial purview. Partnering and other arrangements make it possible for CASUs to offer their services nationwide. Indeed, meeting a customer's needs often means providing services to a regional office and all its posts of duty using a single agreement, even though the customer may have specialized requirements at one or more sites. The customer may wish to utilize one contract for some locations, another contract for others. CASUs can and do give their customers this flexibility under one service agreement.

Simultaneously, the range of services offered by CASUs is expanding significantly. CASUs no longer concentrate solely on mail handling, moving and labor, property disposal, warehousing, photocopying, etc. They now have contracts and strategic partnerships that enable individual CASUs and consortia of CASUs to supply agencies with broad and varied product lines ranging from bridge designs to Federal job classification. In addition, franchises and other enterprising Federal agencies are utilizing their "excess capacity" by providing personnel, payroll, and accounting services other agencies can no longer effectively perform for themselves. CASUs are beginning to play a significant role by tapping into their existing customer base and brokering these services, either with existing vendor contracts or in partnership with other reimbursable government organizations (e.g., franchises). Customer agencies, utilizing the CASU network, are now able to choose from a variety of service contracts. CASUs now use contracts that vary in scope and that are provided by multiple sources, both public and private. In this way, the CASU program has become a chief advocate for competition among Federal administrative support providers. It has grown from a small shared service network to a nationwide operation with estimated FY2000 revenues of approx. \$226 million, FY1999 revenues of approx. \$211 million, and 1998 revenues of more than \$135 million. With customer base and revenues increasing, the CASU Network is clearly serving a customer need.



# Cooperative Administrative Support Program (CASU)

## Strategic Plan 1999 - 2003

### *The strategic plan outlines:*

- a vision for the CASU Network,
- general goals over the next few years,
- strategies for meeting those goals, and
- criteria for performance measurement.

*The fundamental purpose of the plan is to articulate CASU's strategic direction and outlines what we as a Network hope to accomplish within this target five-year period.*

Since our creation in 1985, CASU has had a clear mission to provide a full range of common administrative services to Federal organizations within the United States and overseas. Through our network of entrepreneurial organizations located throughout the United States we have been able to provide 89 reimbursable support services to more than 2000 customer agencies. CASU continues to be a customer focused interagency program that has provided great benefits to the Federal community. Revenues have shown steady growth as indicated below:

FY 2000 Revenues - \$226 million,

FY1999 Revenues - \$211 million,

FY1998 Revenues - \$135 million, and

FY1997 Revenues - \$100 million.

This is an indication that CASU services are needed and valued by our many customers. We will continue to expand our area of operations to provide services to all Federal customers who want them.

Strategic planning is an on-going process. This requires continual review and updates to the strategic plan to respond to trends and changes in the Government and business environment. The strategic plan is fundamentally a management tool to guide the CASU Network for the future. It will assist in aligning the CASU Network mission with its goals, strategies and resources, and ultimately the daily activities of each CASU employee. It is an important first step to ensuring that the CASU Network becomes a performance-based organization. The strategic plan also serves as a blue print for our relationship with our customers, suppliers, host agencies and other stakeholders. Implementation of this plan will help bring world class service to our customers.

A program review was conducted in 1998 to assess the viability of all CASUs. The following criteria was used to evaluate their capabilities: 1) ability to operate using business-like principle (see operating principles and business indicators) and; 2) ability to provide reliable service to customers. In today's environment, CASUs need both local and network-wide business strategies to maintain and strengthen their position in the administrative support arena. The following plan outlines the Network's strategies for accomplishing this goal.

## ***Mission***

To provide the full range of "best value" general support services to participating agencies located in the United States and overseas.

## ***Vision***

The CASU Network is the recognized leader and sets the standard for providing quality and customer convenience in the area of support services and is the first choice of participating agencies in meeting these requirements throughout the country and overseas.

## ***Strategic Goals and Objectives***

### ***I. Strengthen the CASU network's cooperative business nature, customer focus, and links to related enterprising government activities.***

#### **Strategies to Achieve Goal**

- Charter and/or re-certify local CASUs based upon standard business operating criteria (e.g., the presence of an active local customer board of directors, adherence to the CASU operating principles and sound business practices, regular financial review of CASU operations).
- Provide training and guidance to CASUs on the proper role of local boards and lead agencies.
- Sponsor and coordinate training for local CASU board members and CASU Directors and their staffs.
- Initiate a system of network-wide surveys to assure feedback and provide marketing information on performance, service needs and trends.
- Establish partnerships with the franchise funds, ICASS and other franchise-like government organizations to broker their services to both current and prospective CASU customers.
- Maintain active liaison with the CFO Council and OMB.

### ***II. Ensure that CASU maintains a national presence at all levels of the Federal community.***

#### **Strategies to Achieve Goal**

- Develop promotional materials such as annual reports, brochures, newsletters, issue and position papers, national web site, video presentation and other items.

- Make presentations to national organizations (e.g., CFOs Council, Federal Executive Institute, OPM Training Centers, Federal Executive Boards and Associations, American Society for Public Administration).

*III. Establish a national communication clearinghouse that provides consistent and timely information to the CASU network.*

**Strategies to Achieve Goal**

- Ensure that updates are provided and input is solicited for legislative and policy issues.
- Coordinate interactive discussions with speakers, develop and disseminate articles and items of interest to members of the CASU network.
- Serve as a conduit and liaison between the national board and members of the CASU network.
- Develop and publish a CASU network newsletter, annual reports and periodic assessments of the performance of the CASU network.

*IV. Expand CASU's geographic coverage to meet Federal customer agency requirements throughout the U.S. and overseas.*

**Strategies to Achieve Goal**

- Increase the number of Federal communities where CASU has a significant market share by expanding service capabilities through the use of strategic partnerships and establishing new CASUs.
- Assure CASU customers seamless access to a full range of "best value" services overseas through partnership with the ICASS network.
- Establish a national marketing plan that helps to expand the "brand" recognition of the CASU network and its services.

*As a Federal interagency program, achieving these strategic goals should occur with responsible operating principles and business practices. These should be recognized as a commitment to all taxpayers.*

## ***Operating Principles for local and regional CASUs***

1. Each CASU has multiple Federal customer agencies.
2. A local interagency customer board assists each CASU.



3. Each CASU is or will be financially self-supporting within a reasonable time frame as approved by the National Board of Directors.
4. The purchase of services from a CASU is voluntary.
5. Each CASU conducts an annual financial audit and/or management assessment, which meets established federal financial standards with results reported to the lead (host) agency, the local board and the National Board of Directors.
6. Each CASU furthers the intent of the GMRA of 1994 and the Economy Act of 1932, as amended, and complies with all laws and regulations.
7. Each CASU seeks what is best for its government customers from all perspectives including financial, customer convenience and timeliness.

### ***Sound Business Practices for CASUs***

1. Each CASU establishes and follows a strategic business plan for its operations.
2. Each CASU regularly reports on performance outcomes to its local board and the National Board. Additionally, the CASU benchmarks with other operations.
3. Each CASU communicates well with its customers and maintains a customer focus.
4. Each CASU maintains sound financial management and internal control procedures.

### ***Performance Measures***

The following performance measures will be used to measure and assess the performance of the National CASU network. The objective is to measure areas such as:

- (1) what products and services are important to our customers;
- (2) what levels of service are satisfactory to our customers; and
- (3) how well the services are actually being provided.

In general, they are an attempt to develop a communication process with CASU customers and service providers to ensure that we are measuring what they believe is important, as well as the performance capabilities of the CASU Network.

The measurements are divided into two categories: (1) outcome and (2) business indicators. The outcome measures examine overall network performance, and the business indicators describe the operations of the CASU network. The measures are designed to be simple and consistent for use throughout the network. Collectively, they provide the capability to conduct a quantitative and qualitative assessment of the performance of the CASU network.

## **Outcomes**

1. Service Delivery: measures customer perception of how well the products or services are provided.
  - Quality of service
  - Timeliness
  - Consistency
2. Service Value: measures customer perception of the service relative to other alternatives.
  - Savings
  - Convenience

**Business Indicators:** assesses internal performance and the infrastructure of the CASU network.

- Sales Revenue
- Number of customers served
- Types of services provided
- Volume of work provided by contractors (percentage)
- Self sufficiency
- Adherence to CASU operating principles

## **Conclusion**

The CASU Network's strategic plan consists of a combination of integrated, visionary statements and planning, measurement and monitoring tools to provide the Network a policy and operational guide for this target five year period. It is designed to provide a common understanding for our customers, National Board of Directors, suppliers, lead/host agencies, general public and the staffs of the CASUs/FBAs on how the Network expects to accomplish its mission into the next century.

# CASU Charter and Operations

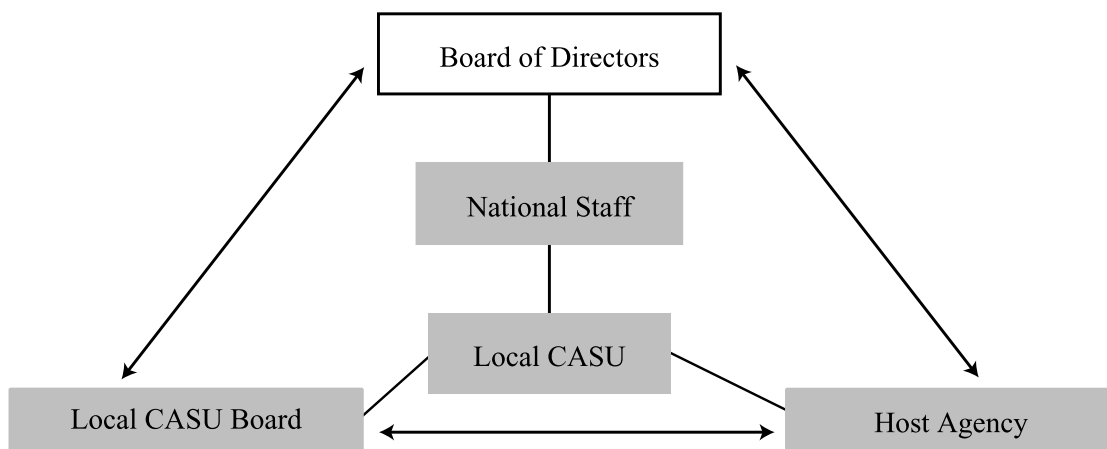
## CHARTERING

When a federal community chooses to form a Cooperative Administrative Support Unit (CASU), a local interagency board or committee submits a proposed charter to the National CASU Board of Directors for approval. The charter proposal describes the CASU location and participating agencies, organization and management structure, initial services to be provided, and the process for evaluating CASU operations. The National CASU Board reviews the charter proposal and approves or rejects the charter.

## STRUCTURE AND OPERATING RESPONSIBILITIES

The National CASU Board serves as an interagency coordinating mechanism for promoting and advocating CASUs. The National Board provides general policy guidance but each CASU operates autonomously. A local board of directors made up of participating agencies provides policy guidance and oversight for the CASU, approves services to be provided, and functions as an information conduit with the National Board and the local lead (host) agency. A lead (host) agency, selected by the local board and approved by the National Board, provides reimbursable personnel, finance, and usually contracting support. A CASU Director, approved by the local board and employed by the lead (host) agency, runs the day-to-day operation. The local board and the lead (host) agency enter into a memorandum of understanding or some type of agreement establishing the roles and responsibilities of the board, the lead agency, and the CASU Director. In some cases, a CASU purchases contracting support from an agency other than the lead agency. All CASU services are subject to the policies and regulations of the agencies writing the contracts and/or providing the services. Each participating agency enters into an interagency agreement or memorandum of understanding with the CASU, defining the services to be provided and payment arrangements.

### CASU Reporting Structure



## EVALUATION AND ASSESSMENT

The local board of directors reviews services being provided and assesses the effectiveness of the CASU. The lead (host) agency ensures that the CASU operates within applicable laws and regulations governing the activities of the CASU. Any other agencies involved in providing CASU services or contract support must ensure that they follow their own applicable laws and regulations. The local board and the lead (host) agency are responsible for ensuring that the CASU follows sound financial management and internal control procedures. In 2000, each CASU submitted a self-assessment to the National CASU Board of Directors, certifying adherence to sound financial practices, operating principles and business-like standards.

## Cooperative Administrative Support Units (CASU)

### *Network Member Offices* (Alpha by State)

**FBA-WEST****Location:** California**Service area:** regional & national

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**FEDSOURCE****Location:** Illinois**Service area:** regional & national

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[www.fedsources.gov](http://www.fedsources.gov)

**ROCKY MOUNTAIN REGIONAL CASU****Location:** Colorado**Service area:** regional & national

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[www.rmrc.casu.gov](http://www.rmrc.casu.gov)

**NEW ORLEANS CASU****Location:** Louisiana**Service area:** statewide

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Fax: (504) 255-6100  
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[www.nfc.usda.gov/feb/casu.htm](http://www.nfc.usda.gov/feb/casu.htm)

**SOUTHEAST REGIONAL CASU****Location:** Florida**Service area:** national & international

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[www.outsourcing.gov](http://www.outsourcing.gov)

**FBA-EAST****Location:** Maryland**Service area:** regional & national

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**MINNESOTA CASU****Location: Minnesota****Service area: statewide**

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**MID AMERICA CASU****Location: Missouri****Service area: regional & national**

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**FEDSOURCE****Location: Missouri****Service area: regional & national**

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**NORTHEAST REGIONAL CASU****Location: New York****Service area: regional & national**

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**FBA-CENTRAL****Location: Ohio****Service area: regional & national**

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**OKLAHOMA CASU****Location: Oklahoma****Service area: regional & national**

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**NE REGIONAL CASU- Pittsburgh****Location: Pennsylvania****Service area: regional**

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**FORT WORTH CASU****Location: Texas****Service area: Dallas/Ft. Worth**

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**GREATER HAMPTON ROADS CASU****Location: Virginia****Service area: national & international**

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## CASU Local Board Chairs

### **FORT WORTH CASU**

#### **Kevin Mc Carthy**

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